



MILWAUKEE COUNTY
Behavioral
Health
Division

myAvatar™

Tips and Tricks



External Appointment Tracking- use the guidelines and tools below to track progress and check the current status of a client's physical care consultations with community based providers.

- A. **External Appointment Tracking Log Form-** the tracking log is an episodic form used to document the status of external appointments to assure that all consultations are completed in a timely manner and that the report of the consultation is documented in Avatar. The tracking log can be updated throughout the appointment process. To begin the process, from Home View:
1. Select your client
 2. Enter external in the Search Forms box.
 3. Select the External Appointment Tracking Log.

The screenshot shows the Avatar system interface. On the left, under 'Recent Clients', 'Client Test (008186265)' is highlighted with a red circle 1. In the center, the 'Search Forms' box contains the text 'external' with a magnifying glass icon, highlighted with a red circle 2. On the right, the 'Menu Path' list shows 'External Appointment Tracking Log' highlighted with a red circle 3.

In the pre-display, select the appropriate episode of care. Click OK.

The screenshot shows the 'External Appointment Tracking Log' pre-display form. It displays client information: Name: CLIENT TEST, ID: 8186265, Sex: Male, Date of Birth: 06/19/1970. Below this is a table with columns 'Episode', 'Program', and 'Start'. The table contains three rows: Episode 3 (43A Intensive Treatment Unit, 06/04/2020), Episode 2 (Psychiatric Crisis Services, 05/19/2020), and Episode 1 (JusticePoint-RSC, 04/17/2020). The 'Episode' column is highlighted with a red box. At the bottom, the 'OK' button is highlighted with a red box.

If this is a new appointment, the form opens. The Log Entry Date pre-populates and you should not need to change it. Click Appointment Information to move to the next section of the form.

The screenshot shows the 'External Appointment Tracking Log' form with the 'Appointment Information' tab selected. The 'Log Entry Date' field is pre-populated with '06/29/2020' and is highlighted with a red box. The 'Appointment Information' tab is also highlighted with a red box.

The form consists of 2 sections, Appointment Information and Appointment Completion Information. To add a new appointment:

1. Click 'Add New Item'.
2. Enter the Ordering Attending Psychiatrist's name (physician that ordered the appointment).
3. Enter the appointment type and as many other details of the appointment as you have when initially completing the form. You can always go back in and edit/update details of the appointment as needed. As you add details, the table in the top portion of the form is populated.
4. Click Submit. The appointment completion information is filed after the appointment is done.

The screenshot shows the 'External Appointment Tracking Log MIT' form. A table at the top lists appointment details. Below the table are three buttons: 'Add New Item' (labeled 1), 'Edit Selected Item', and 'Delete Selected Item'. The 'Appointment Information' section (labeled 2) contains fields for 'Ordering Attending Psychiatrist' (MIRIAM ZINCKE (010487)), 'Appointment Type' (Consultation), 'Is this appointment a follow up to a previous appointment?' (No), 'Clinic/Consultant' (Test Clinic Consultants), 'Location/Address' (111 Main St. Milwaukee), 'Phone Number', 'Pick-up Time' (12:30 PM), 'Transport Company (American or JBM)', 'Transport Company Confirmed' (Yes), 'Nurse Manager/House Supervisor Notified' (Yes), and 'Therapeutic Pass Completed'. The 'Appointment Completion' section (labeled 3) contains fields for 'Confirmed Appointment Date' (07/06/2020) and 'Confirmed Appointment Time' (01:00 PM). A 'Submit' button is located in the top left corner (labeled 4).

Ordering Attending Psychiatrist	Appointment Type	Is this appointment a follow up to a previous appointment?	Clinic/Consul...	Ph
ZINCKE,MIRIAM (010487)	Consultation	No	Test Clinic C...	

Change/update details in an existing appointment, add appointment completion information, or add a new appointment- from Home View, select the client and select the External Appointment Tracking Log Form.

The screenshot shows the 'Recent Clients' and 'Recent Forms' sections. In the 'Recent Clients' section, 'Client Test (008186265)' is highlighted (labeled 1). In the 'Recent Forms' section, 'External Appointment Tracking Log' is highlighted (labeled 2).

Select the appropriate episode and click OK.

Click Edit to: change/update details in an existing appointment, add appointment complementment information, or add a new appointment.

The form opens; select Appointment Information. Note the original log entry date (can't be edited).

To change/update appointment details, select the information in the table to update and click Edit Selected Item. Edit the information in the appropriate section of the form. (You can also choose to delete information by selecting the row in the table and click 'Delete Selected Item'). Only 'Delete' a row of information if it was entered entirely in error. Otherwise, use the Edit functionality.

To enter appointment completion information, scroll to the bottom of the form.

1. Select Yes that the appointment is complete.
2. Select Yes or No that the Consultation Report was received. If no report is received,
3. Select Yes or No that the Consultation Report was given to the Current Attending Physician. (Note that the Current Attending Physician can be different then the Ordering Attending Physician listed in the appointment information section on the top half of the form).
4. Indicate whether or not a follow-up appointment is needed.
5. Enter additional information if the report was received and not given to the current attending physician.
6. Click Submit.

To add another external appointment to the client's tracking log, click 'Add New Item' on the top portion of the form. A new row of data is created to enter new appointment information. As new appointment details are added, they are displayed in the second line of the table.

Ordering Attending Psychiatrist	Appointment Type	Is this appointment a follow up to a previous appointment?	Clinic/Consult...	Ph
ZINCKE, MIRIAM (010487)	Consultation	No	Test Clinic C...	
JEANNETTE, NOAH (010298)				

B. External Appointments Coming Up/Overdue Widget- this new widget is available on both the Inpatient Staff Console and Inpatient Nursing Console. The widget displays appointments coming-up in the next 7 days or overdue appointments. The appointment will display in red the day after the appointment date if the appointment completion section of the form is not completed. The widget is sorted by inpatient unit. Click the medical record number (blue hyperlink) on the widget to open the External Appointment Tracking Log form for the client.

External Appointments Coming Up/Overdue				
Unit	Name	MRN	Appt Date	Overdue
43A Intensive Treatment Unit	TEST, CLIENT	8186265	07/06/2020	
43A Intensive Treatment Unit	TEST, PHARMACY	8186264	06/24/2020	Overdue

- C. **External Appointment Follow Up Needed Report**- run the report for a specified time period to review external appointments that haven't been completed or missing important pieces of information such as, whether a report has been received and if so, the report was given to the current attending physician. From Home View:

Enter External in the Search Forms box and select External Appointment Follow Up Needed.

Name	Menu Path
Query for External CCD	Avatar PM / Client Management / Client Information
External Appointment Follow Up Needed	Avatar PM / BHD Reports
External Appointment Tracking Log	Avatar CWS / Assessments / User Defined Assessments / Milwaukee
External Pharmacy Setup	Avatar CWS / Order Entry / Order Entry System Definitions
External Lab/Radiology Definition for CareConnect	Avatar CWS / Order Entry / Order Entry System Definitions
External Lab Mapping for CareConnect	Avatar CWS / Order Entry / Order Entry System Definitions

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External Client Action

Enter a start and end date for the period you want to review. Click Process.

External Appointment Follow Up Needed

External Appointment Fol

Start Date: 06/22/2020 End Date: 06/30/2020

Process

The report displays various details of the external appointments logged in the specified timeframe and provides a quick summary of external appointments needing follow-up.

<p>Milwaukee County Behavioral Health Div. 9455 W Watertown Plank Rd Milwaukee, WI 53226-3559</p> <p>External Appointment Follow Up Needed</p> <p>43A Intensive Treatment Unit</p>												
Patient Name	MRN	Appointment Type	Ordering Attending Psychiatrist	Clinic/Consultant	Phone #	Location/Address	Appointment Request Faxed	Confirmed Appointment Date	Confirmed Appointment Time	Completed?	Report Recieved	Report given to current attending
POTTERHARRY	8186262	Consultation	NORTON,DIANA	adfasdfasf	434-434-4343	adfasdfasf	5/20/2020	05/25/2020	01:38 PM	Yes	No	No
TEST,PHARMACY	8186264	Consultation	NORTON,DIANA	asdfsdfasdfsdf	414-414-4141	asdfsdfasdfsdf	6/24/2020	06/24/2020	02:06 PM			
TEST,CLIENT	8186265	Consultation	ZINCKE,MIRIAM	Test Clinic Consultants		111 Main St Milwaukee		07/06/2020	01:00 PM			